



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 1/9/2003

GAIN Report #JA3005

Japan

Fishery Products

Annual

2003

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Report Highlights: Sales opportunities for "wild" and "natural" seafood products improving due to labeling changes in Japan, which may benefit imports of Alaskan salmon. Imports of U.S. salmon are forecast 10% higher in 2002. Imports of U.S. roe and eggs are forecast 5% higher in 2002 at 6,700 tons. Japan's total 2003 surimi supply will likely fall due to reduced imports from the U.S., EU and Russia. Asian suppliers of inexpensive surimi continue to expand market share. An increase in imports of U.S. pollack and cod roe in 2002 will not offset a sharp drop in imports from Russia, resulting in tight supplies and high prices, which will hinder roe consumption in 2003.

Includes PSD changes: Yes

Includes Trade Matrix: No

Unscheduled Report

Tokyo [JA1], JA

Overall Seafood Market Situation and Outlook 2002 - 2003	2
Sales Opportunities for Wild and Natural Seafood Improving Due to Changing Dynamics in Japan's Seafood Market	2
Salmon (Trout) Section	2
2003 Market Outlook	2
Wild Alaskan Salmon May Benefit from Changes in Food Labeling During 2003	2
2001-2002 Market Situation Update	3
Surplus Supply Situation Eases Due to Strong Alternative Demand and Low Prices	3
Imports of Alaskan Salmon Rebound in 2002	4
Japanese Salmon Exports on the Rise	5
Salmon and Trout Eggs (Ikura)/Roe (Sujiko) Section	6
Increased Imports and Good Fall Season Catch Likely to Ease High Price Situation for Eggs and Roe	6
Surimi Section	6
2003 Market Outlook	7
Japan's 2003 Surimi Supply May be Limited by Reduced EU and U.S. Imports	7
2001 – 2002 Market Situation Update	7
Consumption of Fish Cake and Paste Products Remains Stagnate in 2002	7
Market Opportunities for Inexpensive Surimi from Asian Suppliers Continues to Grow in 2002	7
Pollock and Cod Roe Section	8
Increase in Consumption of Pollack and Cod Roe During 2003 Hinges on Supply Situation	8
Japanese Salmon and Trout PS&D Table	10
Japanese Salmon and Trout Eggs/Roe PS&D Table	11
Japanese Surimi PS&D Table	12
Japanese Cod and Pollock Roe PS&D Table	13

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Overall Seafood Market Situation and Outlook 2002 - 2003

Sales Opportunities for Wild and Natural Seafood Improving Due to Changing Dynamics in Japan's Seafood Market

The United States remained the top supplier of seafood to Japan in 2002. During January-October 2002, U.S. market share was about 12%, followed by China at 11%, and Russia at 7%. Imports of U.S. seafood (HS 03) were valued at 132 billion Yen during the period, a slight (1%) decrease from 2001. (These figures do not reflect imports of value-added seafood products from Asia that are made with U.S. seafood). A strong dollar and the recent West Coast port strike likely account for the small decline.

Substantial changes in Japan's seafood market in 2002 are expected to create new opportunities for "wild" and "natural" seafood products. Throughout 2002, Japan's food market was rocked by a series of mislabeling scandals involving meat, poultry, vegetables and seafood. Imported eel and oysters, for example, were reportedly sold as domestic product.

In response to mislabeling, which eroded consumer confidence in the food industry, new labeling requirements, both voluntary and mandatory, emerged in 2002 to allay consumer concerns. The seafood industry began to include more product information on labels along with accurate country or origin information. Trade sources report that detailed labeling of seafood products is rapidly being adopted in Japan's retail sector, even among small stores, which previously provided very little information about the products they sold. Some retail chains are even revealing whether seafood is "fresh" or "frozen and thawed" on product labels. Another change in the Japanese seafood market is the move toward traceability and trace back systems. This has allowed some retailers to differentiate their products from competitors to gain customer loyalty to store brands.

Salmon (Trout) Section

2003 Market Outlook

Wild Alaskan Salmon May Benefit from Changes in Food Labeling During 2003

Trade sources report that new labeling practices implemented in 2002 could give an edge to wild and natural salmon over farm-raised varieties, which may benefit U.S. suppliers. The Alaskan Seafood Marketing Institute (ASMI), for example, is developing activities to promote "wild" and "natural" Alaskan salmon. The trend toward new labels is already evident in many retail outlets. Examples include: "Alaskan Sockeye, Wild, Low Brined", "Chile Coho, Farm Raised, Low Brined", and "Norway, Atlantic, Farm Raised, Fresh".

In light of labeling changes, suppliers of farm-raised salmon are moving quickly to shore up the perceived quality of their products. Chile, Norway, Australia and New Zealand, are reportedly emphasizing the quality and freshness of their farm-raised salmon. Competitors are also reportedly employing advanced frozen technologies to improve the quality of salmon destined for the Japanese market, and tailoring their products to specific portion sizes. Some suppliers are reportedly developing verification and traceability systems to enhance the perceived safety of their products.

2001-2002 Market Situation Update

Surplus Supply Situation Eases Due to Strong Alternative Demand and Low Prices

Japan's total salmon and trout supplies (sum of domestic catches and imports, excluding beginning stocks) are estimated at 516,000 tons for 2001 and forecast at 505,000 tons for 2002. Data from an industry fishery survey indicates that Japan will likely have a second consecutive abundant fall season salmon and trout catch in 2002.

The surplus supply situation that developed in 2001 due to import surges of farm raised salmon from Chile, diminished in early 2002 due to strong BSE-related demand. Low prices also helped to stimulate demand for salmon. Japanese household consumption of salmon, particularly of fresh salmon, remained strong into the first half of 2002 (see Table 1).

Total 2002 salmon imports are expected to fall slightly to 265,000 tons. Imports from Chile are projected to fall by 10% to 125,000 tons due to voluntary production reductions. Market sources report that import prices for Chilean salmon jumped considerably during the second half of 2002, reflecting reduced supplies. Imports from Norway, the second largest supplier of farm raised Atlantic salmon, will remain unchanged in 2002, hampered by a strong currency and sluggish demand in Japan's hotel and restaurant sectors.

Table 1. Japanese Per Household Salmon (& Trout) Consumption						
	Fresh/Chilled			Salted/Brined		
	Quantity	Expenditure	Price	Quantity	Expenditure	Price
(JAN. -DEC.)	Gram	Yen	Yen per 100 grams	Gram	Yen	Yen per 100 gram
1995	2,832	3,953	140	2,500	3,692	148
1996	2,984	4,169	140	2,341	3,343	143
1997	3,051	4,446	146	2,185	3,226	148
1998	3,005	4,343	145	2,057	3,017	147
1999	2,974	4,372	147	2,107	3,153	150
% Chg.	-1%	1%	2%	2%	5%	2%
2000	3,140	4,446	142	1,868	2,676	143
% Chg.	6%	2%	-4%	-11%	-15%	-4%
2001	3,394	4,441	131	1,899	2,484	131
% Chg.	8%	-0%	-8%	2%	-7%	-9%
(JAN. -JUN.)	Gram	Yen	Yen per 100 grams	Gram	Yen	Yen per 100 gram
2001	1,546	2,110	136	791	1,046	132
2002	1,660	2,119	128	788	978	124
% Chg.	7%	0%	-6%	-0%	-7%	-6%
Source of Data: Family Income and Expenditure Survey, Ministry of Public Management, Home Affairs (Compiled by Ag. Office)						

Imports of Alaskan Salmon Rebound in 2002

Japan's imports of Alaskan salmon in 2002 are forecast to rise by 10% to 36,000 tons, the first increase in several years. Poor sockeye catches led to declines in U.S. salmon imports in 2000 and 2001. Alaskan sockeye is particularly popular in Japan because the meat has a distinct red color which is preferred over domestic (chum) species, which has a whiter meat. (see Table 2)

Wild salmon represents about 60% of the total salmon supply in Japan. The share of farm-raised salmon has increased over the past several years due in part to smaller U.S. catches. The primary suppliers of imported wild salmon in 2001 were the United States (50%), Russia (40%), and Canada (10%). The primary suppliers of imported farm-raised salmon to Japan are Chile and Norway.

(Note: Starting in 2002, Japan implemented a new HS category for frozen sockeye under HS0303.11.000. From January to October 2002, Japan imported 25,800 tons of sockeye from the United States, and 18,300 tons from Russia).

Table 2. Japanese Salmon and Trout Supply: Wild vs Farm Raised					
Unit: Metric Ton (Round and Eviscerated)					
	1999	2000	% Chg.	2001	% Chg.
Japanese Total Salmon & Trout Supply (A) + (B)	454,515	439,104	-3%	516,183	18%
Wild Share (A)	64%	61%		58%	
Farm Raised Share (B)	36%	39%		42%	
Year Ending Stocks	117,182	103,979	-11%	126,426	22%
1. Wild Salmon and Trout					
Domestic Catches (Ocean & River)	204,441	193,740	-5%	231,272	19%
Imports					
U.S.	54,029	40,364	-25%	32,690	-19%
Russia	25,177	26,391	5%	26,894	2%
Canada	6,508	5,115	-21%	6,072	19%
Other Wild	0	255	NA	102	-60%
Wild Imports Subtotal	85,714	72,124	-16%	65,758	-9%
Wild, Combined Total (A)	290,155	265,864	-8%	297,030	12%
Import Share (to Wild Total)	30%	27%		22%	
2. Farm Raised Salmon and Trout					
Domestic (Coho)	12,716	14,389	13%	10,072	
Imports					
Chile (Coho, Trout, and Atlantic etc.)	74,122	99,475	34%	138,669	39%

Norway (Atlantic and King, Tour etc.)	66,272	53,326	-20%	62,199	17%
Australia (Atlantic etc.)	822	1,138	38%	1,342	18%
N.Z. (King etc.)	1,997	1,656	-17%	2,755	66%
Other Farm Raised	8,431	3,256	-61%	4,116	26%
Farm Raised Imports Subtotal	151,644	158,851	5%	209,081	32%
Farm Raised, Combined Total (B)	164,360	173,240	5%	219,153	27%
Import Share (to the Farm Raised Total)	92%	92%		95%	
Source of Data: World Atlas, MAFF (Compiled by Ag. Office)					

Japanese Salmon Exports on the Rise

Japan's salmon exports jumped to 29,000 tons in 2001 from just 5,000 tons in 2000. Exports are expected to top 40,000 tons in 2003. Primary destinations are China and Thailand where the salmon is processed and usually re-exported back to Japan, accounting for the recent growth in Japanese imports of prepared products (HS 1604.11.010 & 090), which were up by 56% in 2001. Japanese investment in processing facilities in these countries has spurred the import growth in prepared products. During January - October 2002, Japanese imports of prepared salmon exceeded the 2002 full year total, with imports from China up by over 80%. Japanese companies are also reportedly investing in salmon processing facilities in Chile. (see Tables 3 and 4)

Imports of processed salmon are expected to grow over the next several years, particularly as Asian suppliers boost production of flakes, fillets, and portioned cuts, along with other further-processed products. (Note: Imports of prepared products and fillets are not reflected in the PS&D, which only accounts for whole and eviscerated product).

Table 3. Japanese Exports of Salmon and Trout								
Unit: Metric Ton (Customs Clearance Basis)								
	1999	2000	% Chg.	2001	% Chg.	2001	2002	% Chg.
	Jan. - Dec.	Jan. - Dec.		Jan. - Dec.		Jan. - Oct.	Jan. - Oct.	
China	2,027	3,100	53%	23,344	653%	11,483	11,295	-2%
Thailand	67	487	626%	1,385	185%	774	2,452	217%
Taiwan	142	324	129%	1,156	257%	684	2,558	274%
R. Korea	133	234	76%	487	108%	172	729	323%
Russia	272	577	112%	2,408	318%	699	966	38%
Others	119	378	219%	476	26%	271	261	-4%
Total	2,760	5,100	85%	29,258	474%	14,083	18,261	30%
HS Code:								
Source of Data: World Atlas								

Table 4. Japanese Imports of Prepared Salmon and Trout								
Unit: Metric Ton (Customs Clearance Basis)								
	1999	2000	% Chg.	2001	% Chg.	2001	2002	% Chg.

	Jan. - Dec.	Jan. - Dec.		Jan. - Dec.		Jan. - Oct.	Jan. - Oct.	
China	116	369	217%	1,611	337%	1,286	2,341	82%
Thailand	556	875	57%	1,205	38%	1,055	1,104	5%
Chile	403	537	33%	576	7%	414	721	74%
Others	481	606	26%	332	-45%	246	465	89%
Total	1,556	2,386	53%	3,724	56%	3,001	4,632	54%

Source of Data: Japan Customs (World Trade Atlas)

Salmon and Trout Eggs (Ikura)/Roe (Sujiko) Section

Increased Imports and Good Fall Season Catch Likely to Ease High Price Situation for Eggs and Roe

Japan's consumption of salmon and trout eggs and roe in 2002 is forecast to remain relatively unchanged at 13,000 tons. Domestic production, bolstered by a second consecutive abundant fall catch, is also forecast unchanged at about 5,500 tons. (Note: Roe yield estimate is based on the forecast ocean and river catches of 5%/2 of the total tonnage). Based on January - October import data, 2002 egg and roe imports are forecast at 9,000 tons, up about 8% from the previous year. Higher imports have helped to ease the tight supply situation that prevailed in 2001. Total distribution will likely remain unchanged at 13,000 tons. (see Table 5)

Imports of U.S. roe and eggs in 2002 is forecast at 6,700 tons, up 5% from 2001. Reduced supplies of inexpensive Russian pink roe in 2002 is reportedly leading to increased purchases of U.S. and Canadian roe.

Market sources report that prices of domestic eggs at Tokyo's wholesale market rose 10 to 20 percent late in 2002 due to smaller than anticipated arrivals, which were down 20%. Fresh roe (Nama Sujiko, mostly from chum) were also priced higher after arrivals fell 10%. An expected increase in the domestic fall season egg supply and increased imports will likely cause prices to ease in early 2003.

Table 5. Japanese Imports of Salmon and Trout Sujiko and Ikura								
Unit: Metric Ton (Customs Clearance Basis)								
Country of Origin	1999	2000	%Chg	2001	%Chg	2001	2002	%Chg
	Jan. - Dec.	Jan. - Dec.		Jan. - Dec.		Jan. - Oct.	Jan. - Oct.	
United States	6,774	7,821	15%	6,384	-18%	5,514	5,807	5%
Canada	716	585	-18%	475	-19%	290	298	3%
Russia	294	226	-23%	292	29%	205	186	-9%
Denmark	578	596	3%	665	12%	495	607	23%
Finland	324	306	-6%	333	9%	314	440	40%
Others	187	144	-23%	255	78%	199	292	47%

Total	8,873	9,678	9%	8,404	-13%	7,017	7,630	9%
Source of Data: World Trade Atlas								

Surimi Section

2003 Market Outlook

Japan's 2003 Surimi Supply May be Limited by Reduced EU and U.S. Imports

Japan's 2003 surimi supply will be limited by declining cod resources and reported fishery cuts in the European Union and Canada, which will likely lead to tighter U.S. supplies of pollack and Pacific Whiting for Japan's surimi market. Smaller available supplies of white fish, particularly in the EU, will likely boost demand for Alaskan cod fillets, including pollack, which will cause prices to rise for both pollack and Pacific Whiting surimi in Japan. Exacerbating this situation is an expected small drop in Japan's surimi production in 2003 due to a reduced Total Allowable Catch, which is provisionally set at 315,000 tons, down 7% from 2002.

The continuing recession and deflation in Japan will maintain strong demand for inexpensive surimi made from fish species such as *Itoyori* and *Guchi* in 2003. Asian countries, particularly India, will continue to increase market share.

2001 – 2002 Market Situation Update

Consumption of Fish Cake and Paste Products Remains Stagnate in 2002

Reflecting lethargic consumption of surimi-based products, Japan's total surimi distribution has remained static over the past several years at 400,000- 430,000 tons. Japanese household consumption data shows a decline in expenditures for fish cake and paste products. In the first half of 2002 expenditures dropped nearly 4% from the same period in 2001. According to MAFF, Japan's total fish cake and paste production in 2001 decreased by 1% from the previous year to 702,920 tons.

Market Opportunities for Inexpensive Surimi from Asian Suppliers Continues to Grow in 2002

Raw material utilization of surimi has increasingly been met by imports while domestic surimi production has dropped. In 2002, Japan's raw material demand for surimi is estimated at 425,000 tons, unchanged from the previous year. Japan's domestic surimi production (both pollock and other fish species combined) in 2002 is forecast to fall by 2% to 113,000 tons. Total surimi imports in 2002 are forecast to rise by 2% to 320,000 tons. Increased imports of "other fish" surimi from Asian suppliers such as Thailand, India and China, are expected to offset sharply lower supplies of pollock surimi from Russia. During 2002, supplies of Russian pollack surimi reportedly dwindled due to over fishing. Trade sources report that total Russian pollack surimi exports to Japan may only amount to 300 tons in 2002.

The lack of Russian pollack supplies helped to boost purchases of U.S. pollack surimi, despite high prices and a strong dollar. 2002 imports of U.S., pollack surimi are expected to reach 137,000 tons, the same level as 2001. Industry sources report that demand for U.S. surimi has been concentrated on inexpensive varieties. Pacific Whiting (PW) and

"other fish" surimi exports, which make up less than 5% of U.S. exports to Japan, are expected to fall due to the reduced PW fishery quota in the U.S.

The prevailing low price trend in Japan's surimi market coupled with the diversification of surimi-based products, prompted processors to boost utilization of less expensive surimi in 2002. The latest trade data (January - October 2002) reveals significant growth in imports from relatively new suppliers of surimi. Imports from Thailand and India are expected to reach record levels in 2002 at 100,000 tons and 20,000 tons respectively. India's production capacity continues to grow, and a major Indian surimi manufacturer predicts that total output could reach 100,000 tons by 2007. An industry source reports that Thailand is currently at full capacity, limiting further growth in exports to Japan. (see Table 6)

Table 6. Japanese Surimi Imports								
Unit: Metric Ton (Customs Clearance Basis)								
Country of Origin	1999	2000		2001		2001	2002	
	Jan. - Dec.	Jan. - Dec.	% Chg.	Jan. - Dec.	% Chg.	Jan. - Oct.	Jan. - Oct.	% Chg.
US	110,431	116,700	6%	144,744	24%	118,875	117,765	-1%
Russia	13,697	7,533	-45%	4,703	-38%	4,703	265	-94%
Chile	9,241	7,621	-18%	11,523	51%	9,186	8,374	-9%
Argentina	22,356	22,447	0%	16,672	-26%	13,851	12,569	-9%
Thailand	77,396	79,732	3%	86,342	8%	69,237	80,997	17%
China	12,444	13,420	8%	13,483	0%	10,241	11,909	16%
India	7,457	9,178	23%	16,467	79%	12,779	14,164	11%
Others	21,711	24,263	12%	35,718	47%	28,488	29,381	3%
TOTAL IMPORTS	267,276	271,716	2%	313,184	15%	254,581	261,258	3%
HS Codes Covered: 0304.90-0 013, 014, 020, (093), 095 and 099								
Note: HS 093 deleted from 2002 and may be included in 014.								
Source of Data: World Atlas								

Pollock and Cod Roe Section

Increase in Consumption of Pollack and Cod Roe During 2003 Hinges on Supply Situation

Consumption of pollock and cod roe [*Tarako* (Salted Pollock and Cod Roe) and *Mentaiko* (Salted and Hot Pepper and Spice Seasoned Salted Pollock and Cod Roe)] has dropped by over 20% between 1989 and 2001. High market prices owing to reduced supplies are to blame for the consumption decline, causing 2001 ending stocks to swell to 18,000 tons, a 50% increase over the previous year.

The market picture for 2002 is not expected to change, with consumption forecast unchanged at about 53,000 tons and large ending stocks (17,000 tons). High prices and Japan's weak economy have caused roe utilization in the food service sector to remain stagnant in 2002. Domestic production is expected to remain relatively low at around 8,000 tons (Note: Roe yields are estimated on the forecast ocean catch of 6%/2 for pollock and 4%/2 for other cod of the

total tonnage). Imports are forecast to fall by 12% to 44,000 tons, due largely to a sharp (50%) cut in Russian supplies. Increased imports from the U.S. and China will not be enough to offset reduced Russian supplies. (see Table 7) Imports of U.S. pollock and cod roe are forecast to increase in 2002 by about 7% to 25,000 tons, giving the U.S. over half of Japan's cod and pollack roe import market.

The tight supply and high price situation for pollock and cod roe will likely continue in 2003. Imports are expected to increase slightly, assuming Russian supplies recover. However, recovery in Japan's overall cod and pollack roe consumption in 2003 will largely depend whether lower market prices materialize.

Table 7. Japanese Imports of Pollock and Cod Roe								
Unit: Metric Ton (Customs Clearance Basis)								
Country of Origin	1999	2000	%Chg	2001	%Chg	2001	2002	%Chg
	Jan. - Dec.	Jan. - Dec.		Jan. - Dec.		Jan. - Oct.	Jan. - Oct.	
United States	13,869	15,207	10%	23,388	54%	21,318	23,155	9%
Russia	25,222	12,605	-50%	14,285	13%	13,872	7,620	-45%
China	6,616	5,810	-12%	5,334	-8%	4,241	5,077	20%
R. Korea	6,476	5,830	-10%	4,131	-29%	3,195	3,322	4%
Others	1,907	2,490	31%	2,576	3%	2,523	860	-66%
Total	54,091	41,942	-22%	49,714	19%	45,149	40,034	-11%
Source of Data: World Trade Atlas								

Japanese Salmon and Trout PS&D Table

PSD Table						
Country	Japan					
Commodity	Salmon, Whole/Eviscerated				(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	104000	104000	113000	126000	116000	131000
Total Production	220000	242000	214000	240000	0	230000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	265000	274000	245000	265000	0	260000
TOTAL Imports	265000	274000	245000	265000	0	260000
TOTAL SUPPLY	589000	620000	572000	631000	116000	621000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	6000	29000	5000	35000	0	40000
TOTAL Exports	6000	29000	5000	35000	0	40000
Domestic Consumption	470000	465000	451000	465000	0	460000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	470000	465000	451000	465000	0	460000
Ending Stocks	113000	126000	116000	131000	0	121000
TOTAL DISTRIBUTION	589000	620000	572000	631000	0	621000

Japanese Salmon and Trout Eggs/Roe PS&D Table

Commodity: Salmon/Trout Roes (1,000 Metric Tons)								
	1999	2000		2001		2002		2003
			OLD	Prelim.	OLD	Forecast	OLD	Proj.
Beginning Stocks	6	7	7	7	6	8	6	10
Total Production	5	5	5	6	5	6	0	5
Intra EC Imports	NA	NA	NA	NA	NA	NA	NA	NA
Other Imports	9	10	8	8	9	9	0	8
TOTAL Imports	9	10	8	8	9	9	0	8
TOTAL SUPPLY	20	22	20	21	20	23	6	23
Intra EC Exports								
Other Exports	0	0	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0	0	0
Dom. Consumption	13	15	14	13	14	13	0	14
Other Use/Loss	0	0	0	0	0	0	0	0
TOTAL Utilization	13	15	14	13	14	13	0	14
Ending Stock	7	7	6	8	6	10	6	9
TOTAL DISTRIBUTION	20	22	20	21	20	23	6	23

Japanese Surimi PS&D Table

PSD Table						
Country	Japan					
Commodity	Surimi				(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	87000	87000	91000	84000	88000	87000
Total Production	120000	115000	131000	113000	0	110000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	305000	313000	281000	320000	0	305000
TOTAL Imports	305000	313000	281000	320000	0	305000
TOTAL SUPPLY	512000	515000	503000	517000	88000	502000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	1000	4000	1000	5000	0	5000
TOTAL Exports	1000	4000	1000	5000	0	5000
Domestic Consumption	420000	427000	414000	425000	0	415000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	420000	427000	414000	425000	0	415000
Ending Stocks	91000	84000	88000	87000	0	82000
TOTAL DISTRIBUTION	512000	515000	503000	517000	0	502000

Japanese Cod and Pollock Roe PS&D Table

Commodity: Cod/Pollock Roe (1,000 Metric Tons)								
	1999	2000		2001		2002		2003
			OLD	Prelim.	OLD	Forecast	OLD	Proj.
Beginning Stocks	15	13	13	13	12	18	17	17
Total Production	11	11	9	8	11	8	0	8
Intra EC Imports	NA	NA	NA	NA	NA	NA	NA	NA
Other Imports	54	42	48	50	48	44	0	45
TOTAL Imports	54	42	48	50	48	44	0	45
TOTAL SUPPLY	80	66	70	71	71	70	17	70
Intra EC Exports	NA	NA	NA	NA	NA	NA	NA	NA
Other Exports	0	0	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0	0	0
Dom. Consumption	67	53	58	53	60	53	0	53
Other Use/Loss	0	0	0	0	0	0	0	0
TOTAL Utilization	67	53	58	53	60	53	0	53
Ending Stock	13	13	12	18	11	17	0	17
TOTAL DISTRIBUTION	80	66	70	71	71	70	0	70